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ABSTRACT

The competency-based modular curriculum presented here is designed to enable those who participate in the learning experiences to perform the tasks which constitute the five roles of the Employee Development Specialist (EDS): Career Counselor, Consultant, Learning Specialist, Program Manager, and Training Administrator. For each of these five roles, the plan has three components: (1) a short foreword, (2) an outline of the tasks and competencies basic to the role, and (3) two to ten learning modules. The modules are presented in a four column correlated format and contain (1) tasks and competencies, (2) terminal behavioral objectives covering all the tasks and competencies, (3) suggested learning strategies (methods) for each terminal objective including on-the-job training, classroom training, and independent study, and (4) content for each terminal objective including prerequisites, subject material, materials, and resources. Finally, this curriculum plan concludes with a list of fifteen core competencies which are basic to all five roles. A list of resources cited in the learning modules is appended. (EM)

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ED147563

The Employee Development Specialist Curriculum Plan:

An Outline of Learning Experiences for the Employee Development Specialist

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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Introduction

The Employee Development Specialist (EDS) Curriculum Plan was developed by the Bureau of Training, U.S. Civil Service Commission. It was first proposed in Commission Bulletin 410-85 (July 31, 1975), where the Commission committed itself to: "the identification and development of alternative delivery systems designed to develop training and employee development practitioners to their highest level of proficiency."

This report refers to learning experiences as learning modules or modules. Those modules which are classroom oriented constitute the classroom curriculum. The classroom curriculum, together with those modules which use non-classroom learning strategies, make up the EDS Curriculum Plan.

Glossary

For the purpose of this study, the following terms and their definitions have been used:

American Society for Training and Development (ASTD)—a national professional society representing over 13,000 people in the training and development field.

Competency—a skill, ability, knowledge, and/or understanding needed to perform a given task.

Content—substance; subject matter included in a learning experience.

Core Competency—a competency that is needed to perform a large number of tasks in one or more roles of the EDS. As such, it becomes one of a list of competencies that are required to order to perform *any* task or role of the EDS.

Criterion Measure—test which measures behavior against a standard to determine whether the specific desired results (as stated in the objective) have been obtained.

Curriculum—a specific set or list of learning experiences in a given subject area offered by an educational institution.

classroom curriculum—a curriculum offered within a classroom setting (a catalog of courses is a classroom curriculum)

Developer—person(s) utilizing the basic design found in the curriculum plan will add the needed content, visual aids, media, etc.

Delivery System—a method for providing a program or programs of learning experiences; i.e. colleges and universities are one type of delivery system, the American Management Associations and the National Training Laboratories are another type of delivery system.

"Disincentives to Effective Employee Training and Development" Study (Disincentives Study)—a research and development project of the Bureau of Training designed to identify disincentives to effective employee training and development and solutions to same. This project was completed and a report was published in 1973.

Education and Vocational Training Series (GS-1710)—this job classification series covers positions requiring application of full professional knowledge of the theories, principles, and techniques of education and training in such areas as instruction, guidance, counseling, education, administration, development or evaluation of curricula, instructional materials and aids, and educational tests and measurements.

Some positions also require specialized knowledge of one or more subjects in which the education is given.

Employee Development Specialist Series (GS-235)—this job classification series covers positions involving planning, administering, supervising, or evaluating a program designed to train and develop employees. It also includes positions involving guidance, consultation, and staff assistance to management concerning employee training and development matters.

Employee Development Specialist Effectiveness Study (EDS Study)—a research and development project of the Bureau of Training designed to accomplish the objective of developing a complete body of norma-

tive performance requirements for employee development specialists (EDS's) and the mechanism whereby both incumbent and potential EDS's can require these specified skills. The EDS Curriculum Plan is an official subproject of this study.

Enabling Objective—one or more statements of intervening tasks the student must learn in order to achieve the stated terminal objective(s) of the learning experience.

General Education and Training Series (GS-1701)—this job classification series includes positions which primarily involve research or other professional work in the field of education and training when the work is of a generalized or miscellaneous specialized nature.

"Improving the Effectiveness of Employee Development Specialists (Commission Bulletin 410-85)—U.S. Civil Service Commission issuance of July 31, 1975. The report describes four roles of the Employee Development Specialist (EDS) and identifies knowledges and abilities which contribute to effective performance of these roles.

In-Service Training Project—a planned sub-project of the EDS Effectiveness Study designed to develop guidelines for training supervisors concerning on-the-job training and IDP development for EDS's.

Journeyman-level—full performance level for a particular position.

Learning Module—a learning experience in a highly specific subject area; usually of one to three days duration (the modular concept emphasizes short learning experiences that can be taken separately to meet specific needs or can be linked together to meet more general needs).

Learning Strategies—a combination of methods and techniques of learning; and the system of organizing trainees and instruction to accomplish a learning objective(s).

Prerequisite—knowledge and/ or skills required as a preliminary step to begining a particular learning experience.

Role—a set of tasks based on a conceptual foundation that are one of several different ways of performing a function.

Tasks—specific job behaviors that are performed for some purpose, by some method, and according to some performance standard.

Terminal Objective—a statement of what the learner will be able to do as a result of a particular learning experience.

Trainer or Training Officer—A generic term for an individual performing in any of the GS series; 235, 1701, 1710, or 1712.

Training Instruction Series (GS-1712)—this job classification series covers positions concerned with administration, supervision, or instruction in a program of training in an occupation, trade, craft, or subject where the essential qualifications for the work of the positions are a mastery of the knowledges and skills characteristic of the occupational or subject field *and* a practical knowledge of the methods and techniques of instruction.

Background

The EDS Curriculum Plan project was conceptualized out of a finding of the Disincentives Study (see glossary). The finding indicated that trainers needed more access to a fuller range of developmental learning experiences. Furthermore, there was no program in existence which could provide EDS's with a set of comprehensive learning experiences.

A questionnaire, designed to obtain information concerning trainers' perception of their roles, tasks and competencies, as well as other aspects of the training function, was developed, administered and the results analyzed as an initial step in the project.

In addition, a literature search and a marketplace survey were done to provide a basis for the remainder of the project. The literature search increased the bibliography on training to reflect sources on curriculum design. The marketplace survey was designed to gather information on what the private sector and several large government agencies were doing to train their trainers. Other sources, such as a study on professional development conducted recently by the American Society for Training and Development (ASTD) and a comparison of the Instructor (1712) and Employee Development Specialist (235) series, were added to the information pool.

The next part of the project was the development of lists of tasks and matching competencies for the identified roles. The original 410-85 list of competencies, two lists developed by ASTD, as well as input from the EDS Curriculum Plan team were used to allow for the broadest possible range of ideas. Revised task and competency lists, and a new role, that of Career Counselor, resulted. 410-85, although valuable, was already obsolete.

Using the new lists of tasks and competencies, terminal behavioral objectives were written. These objectives were then organized by role into learning modules with suggested learning strategy and content. The result is the EDS Curriculum Plan.

Description

The objective of the EDS Curriculum Plan project was to describe general learning experiences to meet objectives which, when accomplished, will allow an individual to fully carry out the tasks of the employee development specialty (GS-235). Many of these tasks (e.g., those relating to the learning specialist role) are also performed by individuals in related specialties such as the Instructor occupations (GS-1712).

The EDS Curriculum Plan proposes a competency-based curriculum that emphasizes the specific knowledge, ability, and understanding requirements of the tasks which constitute the job of the trainer. These tasks are divided among the five roles of the Employee Development Specialist: Career Counselor,

Consultant, Learning Specialist, Program Manager and Training Administrator.[1] (The roles are not structured according to grade level, but can be carried out at any point in a trainer's career).

The task a trainer is doing at a particular moment determines what role he or she is performing. For example, when a trainer is coordinating the use and maintenance of A/ V equipment, he or she is in the role of the Training Administrator. However, when a trainer is selecting A/ V equipment to instruct, he or she is in the role of the Learning Specialist.

The Curriculum Plan is structured so that trainers may participate in learning experiences which will enable them to perform one, several, or all of the tasks of an Employee Development Specialist. Participants may then gain expertise in one, several or all of the roles. In this way, an individual may participate in learning experiences in accordance with both present position and future goals. The key to the EDS Curriculum Plan is that it is based not on people or positions, but on tasks.

The EDS Curriculum Plan has four sections: (1) a short foreword to each role; (2) lists of tasks and competencies; (3) learning modules for each role; and (4) a list of core competencies which is basic to all roles. For each role there are several learning modules, each covering a specific subject matter area. The modules are arranged in four columns. The first column is a list of all the tasks and competencies covered by that module. The second contains the terminal objectives for the module and the number of the tasks and competencies covered by each objective. Unless otherwise specified, the developer will write the criterion measures for the terminal objectives, and also any enabling objectives which may be needed. The next column contains suggested learning strategies for each terminal objective. Strategies cited include: on-the-job training, classroom training, independent study, and details (assignments to other office or rotational job assignments). An alternative to the primary learning strategy is usually given. (Suggestions for methods are a part of the learning strategy column. Lectures are always combined with other more behaviorally oriented methods.) Content (prerequisites, subject matter, materials and resources) for each terminal objective is listed in the final column. The developer may wish to add additional information under the content column. Following the learning modules is a list of core competencies that are considered important in all the roles of the EDS. Appendix A, containing a list of referenced resources, concludes the EDS Curriculum Plan.

[1]Nadler's research was used as a basis for the role designation. His three roles are Learning Specialist, Consultant and Administrator. Refer to Nadler, Leonard, *Developing Human Resources* (Houston: Gulf Publishing Company, 1970), pp. 147-247. The role of Program Manager emerged from research done for CSC Bulletin 410-85 "Improving the Effectiveness of Employee Development Specialists." Career Counselor was identified as the fifth role as a result of research done by the CSC for the EDS Curriculum Plan.

The
Employee Development Specialist
Curriculum Plan

Career Counselor

Foreword

Definition:

A career counselor facilitates the selection of training and development alternatives concerning career progression, utilizing knowledge of training and counseling skills, tools and resources.

Assumptions about role:

Career counseling is entirely job-related counseling. One does not necessarily have to be an EDS in order to do career counseling, but, as the need exists for the service, EDS's with their knowledge of developmental opportunities, are logical people to provide the service. A degree in counseling is not mandatory. The work itself is not full time, but is done on an as-needed basis as employees request counseling.

Career Counselor-Tasks and Competencies

1. Identifies counseling needs of employees for purposes of obtaining and providing viable information concerning training/ developmental alternatives and matching resources
   a. Ability to identify appropriate resources
   b. Ability to refer employees to appropriate resources
   c. Ability to establish supportive and open counseling environment
   d. Ability to choose appropriate interviewing techniques
   e. Ability to utilize combinations of counseling techniques
   f. Ability to identify employees' informal skills for purposes of clarifying and objectifying career potential
   g. Ability to aid employees in clarifying career development needs
   h. Knowledge of own values and emotional systems and the potential impact on counseling relationship
   i. Ability to aid employee in the process of moving from feelings about career potential to a realistic career development plan
   j. Ability to develop strategies for interviewing/ counseling employees to obtain data pertinent to training or development needs
2. Assists in the development of employees' career plans (IDP's) using information on specific career requirements, organization's staffing needs, and available developmental opportunities
   a. Ability to assist employee to accept his/ her role in actively controlling the pursuit of training and development activities
   b. Ability to use directive counseling techniques
   c. Understanding of agency career ladders
   d. Knowledge of available sources of information on Federal career progressions
   e. Understanding of interfacing personnel programs
   f. Ability to describe training and education generally required to reach individual career goals
3. Provides information to employees and/ or supervisors on training and development alternatives based

on employee's career goals, objectives and skill/ knowledge requirements

a. Ability to describe and explain training and developmental opportunities sponsored by the Federal government
b. Ability to select internal and external resources which meet individual training needs
c. Ability to establish and utilize personal contacts in making professional referrals both inside and outside of immediate organization

4. Analyzes data from counseling case records to determine trends which indicate needs for organizational attention to career programs
   a. Knowledge of interfacing personnel programs
   b. Knowledge of current and emerging organizational needs
   c. Ability to recognize relationships between various types of counseling data and organizational programs
5. Develops or selects appropriate instruments for recording data obtained from employee, supervisor, etc. as part of counseling process
   a. Understanding of impact of pertinent personnel regulations and procedures
   b. Ability to construct data recording instruments
   c. Knowledge of routine and specialized requirements for counseling data

Module 1
Counseling/Interviewing

ROLE: Career Counselor

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Identifies counseling needs of employees for purposes of obtaining and providing viable information concerning training/developmental alternatives and matching resources a. Ability to identify appropriate resources b. Ability to refer employees to appropriate resources c. Ability to establish supportive and open counseling environment d. Ability to choose appropriate interviewing techniques e. Ability to utilize combinations of counseling techniques f. Ability to identify employees' informal skills for purposes of clarifying and objectifying career potential g. Ability to aid employees in clarifying career development needs h. Knowledge of own values and emotional systems and the potential impact on counseling relationship i. Ability to aid employee in the process of moving from feelings about career potential to a realistic career development plan j. Ability to develop strategies for interviewing/counseling employees to obtain data pertinent to training or development needs	The career counselor will be able to: 1.a.b. 3.b. Select the appropriate resource for each described need using a list of resources from which counseling can be obtained.	Independent Study: exercises (alternative) Independent Study: professional readings	Subject matter: Government special programs Resources: Troubled employee program Out placement programs Personal office-occupational information Upward mobility programs Management intern programs Materials: List of resources for training and other counseling needs
2. Assists in the development of employee career plans (IDP's) using information on specific career requirements, organization's staffing needs, and available developmental opportunities a. Ability to assist employee to accept his/her role in actively controlling the pursuit of training and development activities b. Ability to use directive counseling techniques c. Understanding of agency career ladders d. Knowledge of available sources of information on Federal career progressions e. Understanding of interfacing personnel programs f. Ability to describe training and education generally required to reach individual career goals	1.a.b. 3.c. Identify, within his/her agency, the office and persons responsible for counseling or providing information to employees given a list of counseling needs in the area of out placement, career counseling, upward mobility, personal problems and general government occupational information.	Independent Study: research assignment	Resources: Agency organization charts Organization directories Government personnel programs
3. Provides information to employees and/or supervisors on training and development alternatives based on employee's career goals, objectives and skill/knowledge requirements a. Ability to describe and explain training and developmental opportunities sponsored by the Federal government b. Ability to select internal and external resources which meet individual training needs c. Ability to establish and utilize personal contacts in making professional referrals both inside and outside of immediate organization	1.c.e.j. Develop an encouraging atmosphere and supportive framework for discussing career plans, in a role play situation concerning an employee who is threatened and confused about the requirement for an annual career development plan. This objective will be successfully obtained when the employee being counseled agrees that:	Classroom: role play (alternative) On-The-Job Training: observation of counseling sessions	Resources: Literature on active listening techniques Literature on interviewing techniques Literature on directive/nondirective counseling techniques Data on requirements for career development plans

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
	1) he/she was encouraged to tell the counselor the "whole story" 2) he/she felt that the counselor actively listened 3) he/she felt free to return for further discussions concerning the career plan.		
	1.h. Identify his/her basic value orientations, given the results of several self-assessment instruments dealing with personal value orientations.	Classroom: diagnostic exercises	Resources: Pfieffer, W. and Jones, J. *The Annaul Handbook for Group Facilitators.* Pfeiffer, W. and Jones, J. *A Handbook of Structured Experiences for Human Relations Training.*
	1.d.f.g.i. Counsel an employee to determine: 1) specific career development desires of employee 2) employee's knowledges and skills 3) employee's employment history, given a case history situation concerning an employee who needs counseling on developmental activities needed to reach a career objective.	Classroom: role play and/or case history (alternative) On-The-Job-Training: observation of a counseling session Independent Study: case history.	Subject matter: Interview techniques Counseling techniques Occupational opinion surveys
	2.a. Facilitate the completion of a career development plan for a one year period by having an employee list necessary developmental activities and the steps the employee needs to achieve those activities. Participant will be given an individual's career goals, present knowledge/skill levels and general requirements for that career field.	Classroom: individual exercises (alternative) Independent Study: case history	Subject matter: *Handbook of Occupational Groups and Series of Classes* *Dictionary of Occupational Titles*

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
	2.b. Explain to an employee the need for following a recommended outline of training/developmental activities, using outlines completed for qualification standard job requirements in a role play situation. This objective will be successfully obtained when the employee being counseled can state at least 2 beneficial reasons for following the plan.	Classroom: role play (alternative) On-The-Job Training: counseling an employee	Subject matter: Directive counseling techniques Resources: X-118 information for specific jobs
	2.c.d.e. Identify at least 2 of his/her agency's career ladders, including entry level requirements and journeyman level requirements, and identify at least 2 of his/her agency's personnel programs (Upward Mobility, Intern, etc.) that are present to help employees move up career ladders, given a list of research criteria.	Independent Study: research assignment	Subject matter: Research questions Basic information on career ladders-definitions, etc.
	2.f. Outline all general qualification requirements and list at least 2 training or education experiences that relate to those requirements, given 3 qualification standards for particular job series and 3 sample cover plans with specific grade goals.	Classroom: exercises (alternative) Independent Study: individual exercises	Resources: X-118 Qualification Standards Sample career plans Resources for training and development activities
	3.a. Identify those training sources which are sponsored by the Federal Government, given a list of varied sources for training and development opportunities.	Classroom: exercises (alternative) Independent Study: research assignment	Resources: *Interagency Training Catalog of Courses* Information on government and non-government training development resources

Module 2
Administrative Counseling Activities

ROLE: Career Counselor

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
4. Analyzes data from counseling case records to determine trends which indicate needs for organizational attention to career programs a. Knowledge of interfacing personnel programs b. Knowledge of current and emerging organizational needs c. Ability to recognize relationships between various types of counseling data and organizational programs 5. Develops or selects appropriate instruments for recording data obtained from employee, supervisor, etc. as part of counseling process a. Understanding of impact of pertinent personnel regulations and procedures b. Ability to construct data recording instruments c. Knowledge of routine and specialized requirements for counseling data	The career counselor will be able to: 4.a.b.c. Identify agency program areas that should receive specific information concerning employees, given representative data composites from counseling records and a list of various agency personnel programs, i.e. upward mobility, troubled employee, out placement, general personnel, etc. 5.a.b.c. Construct a data recording instrument for obtaining and recording information needed by a career counselor, given a profile concerning an upcoming interview and a description of data that should be obtained	Classroom: case study or in-basket exercise (alternative) Independent Study: in-basket exercise Classroom: exercise (alternative) Independent Study: research project	Resources: Case composites Government personnel program information Resources: Sample interview data Pertinent personnel regulations Data-gathering instruments Methods for recording interview data Interview information profile

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Consultant

Definition:

The consultant is concerned with research and development of tools, methods, etc. to improve training, and with providing management and employees with advice and assistance on a variety of organizational problems.

Assumptions about role:

Interest in this facet of the training job is particularly high at present. The Civil Service Commission's Disincentives to Training Study indicated that demand for consultants' skills exist among managers. Trainers, also, see a need to be able to provide problem-solving skills to the organization. Since the consultant emphasis is relatively new to the training field, its tasks may not be performed as they should be. Skills taught in the curriculum add to the viability of the trainer as consultant.

Consultant - Tasks and Competencies

1. Negotiates with client to determine scope of consultation effort
   a. Ability to determine consultative strategy
   b. Conceptual understanding of the subroles of the consultant
   c. Ability to construct a detailed plan for job study specifying scope and limits of project, specific objectives, specific steps to meet objectives, time schedules, staff and task assignments
   d. Ability to clarify complex procedures
   e. Knowledge of intervention, advisory and persuasion techniques
   f. Ability to apply cost/ benefit analysis
   g. Ability to conduct meetings and interviews
2. Gathers information on organizational goals, objectives, and work processes
   a. Ability to learn a variety of specialized vocabularies
   b. Ability to determine formal/ informal organizational structure
   c. Ability to see the organization in terms of the interrelationships between the organization, its environment, the groups and individuals composing the organization
   d. Ability to gather information through interviews, observation, and research
   e. Ability to plan and conduct reliability/ validity studies
3. Conducts the data gathering and problem identification portion of a performance analysis
   a. Ability to develop and use information gathering techniques
   b. Ability to determine and measure job performance requirements
   c. Ability to determine and measure actual job performance
   d. Ability to use specialized vocabulary
   e. Knowledge of formal/ informal organizational structure

f. Ability to identify the appropriate problem finding techniques
g. Ability to identify the appropriate problem solving techniques
h. Ability to collect problem indicators
i. Ability to determine when to plan and conduct reliability/ validity studies

4. Selects, plans, and/ or implements the solution(s) of a performance analysis
   a. Knowledge of training and other solutions
   b. Ability to apply cost/ benefit analysis
5. Evaluates results of a performance analysis
   a. Ability to determine effectiveness of implemented solution
   b. Ability to apply basic statistical techniques
   c. Ability to apply cost/ benefit analysis
   d. Ability to validate the process
6. Determines training implications of proposed changes in mission, technology, and organizational structure
   a. Ability to apply cost/ benefit analysis
   b. Ability to predict training needs induced by organizational change
   c. Ability to predict training needs given the plans and goals of the organization
7. Reports results of performance analysis
   a. Ability to advise management of immediate and long-range training needs
   b. Knowledge of appropriate agency reporting requirements
8. Guides agency personnel in the application of methods and techniques to facilitate the training and development process
   a. Ability to apply specific training methods and techniques to meet desired training and development objectives
   b. Ability to facilitate decision-making processes to help agency personnel to meet desired training and development objectives
   c. Ability to transfer to client the problem-solving skills of the consultant

Module 1
Profile of the Consultant Role

ROLE: Consultant

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Negotiates with client to determine scope of consultation effort a. Ability to determine consultative strategy b. Conceptual understanding of the subroles of the consultant c. Ability to construct a detailed plan for job study specifying scope and limits of project, specific objectives, specific steps to meet objectives, time schedules, staff and task assignments d. Ability to clarify complex procedures e. Knowledge of intervention, advisory and persuasion techniques f. Ability to apply cost/benefit analysis 7. Reports results of performance analysis a. Ability to advise management of immediate and long-range training needs 8. Guides agency personnel in the application of methods and techniques to facilitate the training and development process b. Ability to facilitate decision-making processes to help agency personnel to meet desired training and development objectives	The consultant will be able to: 1.a.c.d.e.f. 8.b. Construct a basic proposal for consulting efforts which will include: 1. consultative strategy 2. cost/benefit analysis 3. scope and limits of efforts 4. end products 5. time schedules 6. personnel requirements 7. evaluation strategy.	Classroom: case history/lecture/guided discussion (alternative) Independent Study: project	Subject matter: Criteria for consultation Resources: Blake-Mouton. *Consultation* Lippitt, G. *Visualizing Change* Nadler, L. *Developing Human Resources* Warren, M.W. *Training for Results* Schein, E. *Process Consultation: Its Role in O.D.* Walton, R. *Interpersonal Peacemaking* Margolis, F. *Training by Objectives*
	1.b. Determine the appropriate subrole(s) needed to facilitate that effort which meets the criteria set forth by various recognized consulting sources, given a case study illustrating a need for a consulting effort.	Classroom: case history	Subject matter: Subrole(s) of the consultant Resources: Lippitt, G. *Organization Renewal* Nadler, L. *Developing Human Resources* Blake-Mouton. *Consultation* Warren, M.W. *Training for Results* Subject matter: Intervention techniques Persuasion-marketing, advocating Advising-presenting alternatives and recommendations

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
	1.e. 7.a. Demonstrate in a role play situation the ability to influence others by convincing group members of a particular course of action through the use of intervention, advisory, and persuasion techniques.	Classroom: lecture/reading/role play	Resources: *Training and Development Journal* *Human Behavior* Pfeiffer, W. & Jones, J. *A Handbook of Structured Experiences for Human Relations Training* Pfeiffer, W. and Jones, J. *The Annual Handbook for Group Facilitators*

Note: This is the overview module for the consultant. In addition to the tasks and competencies being covered, this module should also deal with ethics of the consultant, internal vs. external consultants, technical and process consultation, and proactiveness of this role. This module should be developed into a three-day session. The first terminal objective will probably take two days to complete.

Module 2
Methodologies for Consultants

ROLE: Consultant

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
8. Guides agency personnel in the application of methods and techniques to facilitate the training and development process a. Ability to apply specific training methods and techniques to meet desired training and development objectives 1. Negotiates with client to determine scope of consultation effort g. Ability to conduct meetings and interviews	The consultant will be able to: 1.g. 8.a. Lead the following typical group interactions in a role play assignment: a small group, a task oriented meeting, a team building session, or a data-gathering interview using the established criteria of group dynamic techniques.	Classroom: lecture/reading/role play and feedback	Prerequisites: Module 1 of Consultant Subject matter: Group dynamics Process consultation techniques and resources

Module 3
Gathering Information

ROLE: Consultant

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
2. Gathers information on organizational goals, objectives, and work processes a. Ability to learn a variety of specialized vocabularies b. Ability to determine formal/informal organizational structure c. Ability to see the organization in terms of the interrelationships between the organization, its environment, the groups and individuals composing the organization d. Ability to gather information through interviews, observation, and research e. Ability to plan and conduct reliability/validity studies 3. Conducts the data-gathering and problem indentification portion of a performance analysis a. Ability to develop and use information-gathering techniques d. Ability to use specialized vocabulary e. Knowledge of formal/informal organizational structure	The consultant will be able to: 2.a.b.c. Identify the specific information in a hypothetical organizational situation to determine: 1) formal/informal organizational structure 2) organizational mission/goals and work processes 3) external environmental influences 4) groups/individuals composing the organization	Classroom: lecture/simulation games/questions and answers	Prerequisite: Module 1 of Consultant Resources: Simulation games
	2.d.e. 3.a.d.e. Gather data in interview, observation, and research situations, etc., using the appropriate data-gathering and reliability/validity techniques.	Independent Study: readings, projects (alternative) On-The-Job Training: interviews, observation situations and research assignments	Subject matter: Data-gathering techniques Reliability/validity techniques

Module 4
Performance Analysis

ROLE: Consultant

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
3. Conducts the data-gathering and problem identification portion of a performance analysis b. Ability to determine and measure job performance requirements c. Ability to determine and measure actual job performance 4. Selects, plans, and/or implements the solution(s) of a performance analysis a. Knowledge of training and other solutions b. Ability to apply cost/benefit analysis 5. Evaluates results of a performance analysis a. Ability to determine effectiveness of implemented solution b. Ability to apply basic statistical techniques c. Ability to apply cost/benefit analysis d. Ability to validate the process 6. Determines training implications of proposed changes in mission, technology, and organizational structure a. Ability to apply cost/benefit analysis b. Ability to predict training needs induced by organizational change c. Ability to predict training needs given the plans and goals of the organization 7. Reports results of performance analysis b. Knowledge of appropriate agency reporting requirements 8. Guides agency personnel in the application of methods and techniques to facilitate the training and development process a. Ability to apply specific training methods and techniques to meet desired training and development objectives c. Ability to transfer to client the problem-solving skills of the consultant	The consultant will be able to: 3.b.c. 8.a. Conduct the data-gathering and problem identification portions of a performance analysis using the appropriate steps in a front-end analysis process. 4.a.b. 6.a.b.c. Select and plan for the implementation of one or more solutions using the appropriate steps in a front-end analysis process and data generated in Task 3. 5.a.b.c.d. 7.b. Present a report on the effectiveness of the chosen solution(s) by explaining the criteria used to determine if causal factors have or have not been eliminated. 8.c. Discuss the importance of the consultant's transferring problem-solving techniques to client, citing two ways to effect the transfer.	Classroom: lecture/exercises/reading (alternative) Independent Study: gather data and identify problem occurring at job site Classroom: coaching by instructor (alternative) Independent Study: coaching by a knowledgeable individual at job site Independent Study: write a report of process and results of front-end analysis of problem at job site (alternative) Classroom: guided discusion of presented reports	Prerequisite: Module 1 and 3 of Consultant Subject matter: Job analysis Task analysis Performance analysis (or front-end analysis) Resources: Fine, S.A., and Wiley, W.W. *An Introduction to Functional Job Analysis* Harless, J. H. *An Ounce of Analysis (Is Worth a Pound of Objectives)* Mager, R.F., and Pipe, P. *Analyzing Performance Problems (or "You Really Oughta Wanna")* Praxis Corporation "Steps in the Performance Audit" (chart)

Learning Specialist

Foreword

Definition:
The learning specialist designs, develops, conducts and evaluates learning experiences.

Assumptions about the role:

Learning specialist activities are the base of the training job. Reasons for further development in the role are: 1) more agency in-house training is needed; and 2) a systematic approach to training design should be implemented.

Learning Specialist - Tasks and Competencies

1. Conducts population analysis
   a. Knowledge of the types of information needed to conduct a population analysis
   b. Ability to obtain input from prospective learners
   c. Ability to define population in the data categories necessary for the design of the training
2. Conducts task analysis
   a. Knowledge of task analysis procedures
   b. Knowledge of the uses of task analysis
3. Writes learning objectives
   a. Ability to relate learning objectives to identified tasks
   b. Ability to set learning objectives which enable participants to acquire necessary competencies
   c. Ability to formulate specific objectives against which to evaluate training results
4. Researches pertinent literature in the field in order to establish foundation in subject matter
   a. Ability to use the library and other content resources
5. Interfaces with subject matter and job experts in order to establish foundation in subject matter
   a. Ability to plan for effective use of resources
6. Sequences learning objectives
   a. Knowledge of methods for sequencing objectives
7. Selects and/or develops evaluation techniques and instruments
   a. Ability to build in continuous feedback mechanisms to instructor and participants
   b. Ability to construct practical devices to measure the four levels of evaluation, i.e., reaction, learning, behavior, and results
8. Selects content based upon sequence of learning objectives
   a. Ability to use data gathered as a guide to the selection of content
9. Organizes content based upon sequence of learning objectives
   a. Ability to use data gathered as a guide to the design of training
   b. Knowledge of methods for sequencing objectives
10. Selects learning strategy/methodology

a. Ability to apply current concepts of adult learning theory
b. Ability to judge the potential of various training methods and strategies to achieve the training objectives

11. Identifies and/or develops learning materials and resources (both in-house and contract), including personnel resources
    a. Ability to use the broad range of materials and personnel available to achieve training objectives
    b. Ability to apply adult learning theory to the preparation of training materials
    c. Knowledge of available printing, graphics and production resources
12. Selects A/V equipment and materials
    a. Knowledge of available A/V equipment and materials
    b. Knowledge of the factors affecting the use of A/V equipment and materials in different learning situations
    c. Ability to apply current concepts of adult learning theory
13. Prepares and/or adapts lesson plans
    a. Ability to organize course in terms of lessons that emanate directly from and reflect the intent of the learning objectives
    b. Ability to outline materials in order to facilitate the achievement of instructional intent
    c. Ability to use the agency preferred lesson plan format
14. Develops criteria for the selection of participants
    a. Knowledge of the population for which the training experience is intended
    b. Knowledge of the entry level competencies necessary for the training experience
15. Validates all phases of the training experience
    a. Ability to test objectives and content of the training experience for relevance and appropriateness
16. Composes descriptions to publicize available training
    a. Knowledge of the information requirements of training descriptions
17. Instructs individuals and/or groups in specific subject matter areas
    a. Knowledge of specific subject matter to be covered in training
    b. Ability to use lesson plans
    c. Ability to apply adult learning theory in the classroom
    d. Ability to communicate learning objectives to participants
    e. Ability to present content using methods, strategies and materials outlined in the training design
    f. Ability to perform the roles needed to instruct, i.e., facilitator, resource person, content transmitter
    g. Ability to use group processes effectively
    h. Ability to effectively use training aids and A/V equipment and materials
    i. Ability to recognized and incorporate feedback from participants
    j. Ability to give constructive feedback to participants
18. Collects and processes feedback from the training experience using evaluation techniques and instruments.
    a. Ability to administer criterion measures
    b. Ability to interpret evaluation data for all aspects of the program

c. Ability to feedback the results of the training experience to management

19. Modifies training experience where needed based on evaluation results
    a. Knowledge of the need to use evaluation data for professional and training experience improvement
    b. Ability to incorporate the necessary professional and/or training experience changes based on evaluation results

Module 1
Data Gathering and Research

ROLE: Learning Specialist

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Conducts population analysis a. Knowledge of the types of information needed to conduct a population analysis b. Ability to obtain input from prospective learners c. Ability to define population in the data categories necessary for the design of the training 2. Conducts task analysis a. Knowledge of task analysis procedures b. Knowledge of the uses of task analysis 4. Researches pertinent literature in the field in order to establish foundation in subject matter a. Ability to use the library and other content resources 5. Interfaces with subject matter and job experts in order to establish foundation in subject matter a. Ability to plan for effective use of resources	The learning specialist will be able to: 1.a.b.c. Gather data to construct a target population profile.	Classroom: lecture/group exercises (alternative) Independent Study: reading/exercises	Resources: Workshop in Training Course Design Kemp, J.E. *Instructional Design: A Plan for Unit and Course Development*
	2.b. Construct a simulated task analysis of a given job, using worksheets and checklists.	Classroom: lecture/exercise (alternative) Independent Study: reading/exercises	Resources Fine, S.A. *An Introduction to Functional Job Analysis* Harless, J. *An Ounce of Analysis (Is Worth a Pound of Objectives)*
	4.a. 5.a. Cite two major reference sources from which specific learning subject matter can be gained, given a list of varied training sources and a specific subject which must be referenced.	Independent Study: reading/exercises	Subject matter: Use of agency library Agency organizational structure (for location of personnel resources)

Module 2
Learning Objectives

ROLE: Learning Specialist

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
3. Writes learning objectives a. Ability to relate learning objectives to identified tasks b. Ability to set learning objectives which enable participants to acquire necessary competencies c. Ability to formulate specific objectives against which to evaluate training results 6. Sequences learning objectives a. Knowledge of methods for sequencing objectives	The learning specialist will be able to: 3.a.b.c. Formulate/write learning objectives that will include: 1) action verb with object, 2) conditions, and 3) standards of performance using the results of a population and task analysis.	Independent Study: reading/exercises (alternative) Classroom	Subject matter: Instructional objectives Resources: Workshop in Training Course Design Instructor Training Mager, R. *Preparing Instructional Objectives* Kemp, J.E. *Instructional Design: A Plan for Unit and Course Development* Popham, J. & Baker, E. *Establishing Instructional Goals* Armstrong, R., et. al. *The Development & Evaluation of Behavioral Objectives* Byers, K. *Employee Training & Development in the Public Sector* Tracy, W.R. *Designing Training and Development Systems* "Performance Objectives" U.S. Air Force film
	6.a. Sequence learning objectives based on the 1) domains of learning: a) psychomotor, b) cognitive, c) affective; 2) psychological order; 3) dependentcy order; 4) interest order; 5) logical order; 6) chronological order; 7) critical incidents.	Classroom: lecture/reading/exercises (alternative) Independent Study: reading/exercises	Resources: Workshop in Training Course Design Mager, R.F. *Measuring Instructional Intent* U.S. Dept. of Defense, Instructional Systems Development Model

Module 3
Curriculum Design

ROLE: Learning Specialist

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
8. Selects content based upon sequence of learning objectives a. Ability to use data gathered as a guide to the selection of content 9. Organizes content based upon sequence of learning objectives a. Ability to use data gathered as a guide to the design of training b. Knowledge of methods for sequencing content 10. Selects learning strategy/methodology a. Ability to apply current concepts of adult learning theory to the use of learning strategies and methodologies b. Ability to judge the potential of various training methods and strategies to achieve the training objectives 11. Identifies and/or develops learning materials and resources including personnel a. Ability to use the broad range of materials and personnel (both in-house and contract) available to achieve training objectives b. Ability to apply adult learning theory to the preparation of training materials c. Knowledge of available printing, graphics and productions resources.	The learning specialist will be able to: 8.a. Select training content using a set of learning objectives. 9.a.b. Organize training content using a set of learning objectives and selected content. 10.a.b. Match learning situations with the appropriate methods and techniques, using a list of instructional methods and techniques. 11.a.b.c. 12.a.b.c. Develop a description of needed materials and resources given a choice of several learning situations that include objectives. 13.a.b.c. Prepare a lesson plan for a training module, using learning objectives, resources materials.	Independent Study: reading/exercises (alternative) Classroom: lecture/exercises	Subject matter: Adult learning theory Methods and techniques of learning Characteristics of A/V equipment Types of training materials and their uses Resources: Workshop in Training Course Design Bergevin, P. *Adult Education Procedures* Butler, *Instructional Systems Development for Vocational and Technical Training* Johnson & Johnson, *Developing Individualized Instructional Material* Mager, R. *Developing Vocational Instruction* Knowles, M. *The Adult Learner - A Neglected Species* Kemp, J. *Instructional Design: A Plan for Unit and Course Development* Tracy, W. R. *Designing Training and Development Systems* Ingalls, J.D. *A Trainer's Guide to Andragogy: Its Concepts, Experience, and Applications (DHEW)*

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
12. Selects A/V equipment and materials a. Knowledge of available A/V equipment and materials b. Knowledge of the factors affecting the use of A/V equipment and materials in different learning situations c. Ability to apply current concepts of adult learning theory 13. Prepares and/or adapts lesson plans a. Ability to organize course in terms of lessons that emanate directly from or reflect the intent of the learning objectives b. Ability to outline materials in order to facilitate the achievement of instructional intent c. Ability to use the agency preferred lesson plan format			Resources: Journals: *Audio-Visual Instruction* *Education Technology*

Module 4
Evaluation and Validation

ROLE: Learning Specialist

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
7. Selects and/or develops evaluation techniques and instruments a. Ability to build in continuous feedback mechanisms to instructor and participants b. Ability to construct practical devices to measure the four levels of evaluation, i.e., reaction, learning, behavior, and results 15. Validates all phases of the training experience a. Ability to test the objectives and content of the training experience for relevance and appropriateness 18. Collects and processes feedback from the training experience using evaluation techniques and instruments a. Ability to administer criterion measures b. Ability to interpret evaluation data for all aspects of the program c. Ability to feedback the results of the training experience to management 19. Modifies training experience where needed based on evaluation results a. Knowledge of the need to use evaluation data for professional and training experience improvement b. Ability to incorporate the necessary professional and/or training experience changes based on evaluation results	The learning specialist will be able to: 7.a.b. Develop feedback techniques and instruments appropriate for a specific learning experience. 15.a. Outline a plan for validating a learning experience. 18.a.b.c. 19.a.b. State necessary revisions in learning experience given evaluation data and learning objectives.	Independent Study: reading/exercises (alternative) Classroom: lecture/group exercises On-The-Job Training	Subject matter: Formative and summative evaluation of training Validation of training Resources: Kirkpatrick, D. *Evaluation of Training* Tracey, W. *Designing Training and Development Systems* Weiss, C. *Evaluation Research* Chabotar, K. T. *Evaluation Guidelines for Training Programs*

Module 5
Participant Selection

ROLE: Learning Specialist

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
14. Develops criteria for the selection of participants a. Knowledge of the population for which the training experience is intended b. Knowledge of the entry level competencies necessary for the training experience 16. Composes descriptions to publicize available training a. Knowledge of the information requirements of training descriptions	The learning specialist will be able to: 14.a.b. Develop selection criteria based on entry level skills, knowledges and abilities using knowledge of the target population and learning objectives. 16.a. Write a description of the training experience including title, objectives, subject areas, selection criteria, date, time and place.	Classroom: lecture/group exercises (alternative) On-The-Job Training	Prerequisites: Modules on 1) Data Gathering and Research and 2) Learning Objectives Subject matter: Entry-level skills determination Materials: Sample training announcements

Module 6
Instruction

ROLE: Learning Specialist

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
17. Instructs individual and/or groups in specific subject matter areas a. Knowledge of specific subject matter to be covered in training b. Ability to use lesson plans c. Ability to apply adult learning theory in the classroom d. Ability to communicate learning objectives to participants e. Ability to present content using methods, strategies and materials outlined in the training design f. Ability to perform the roles of facilitator and resource person, as well as of content transmitter g. Ability to use group processes effectively h. Ability to effectively use training aids and A/V equipment and materials i. Ability to recognize and incorporate feedback from participants j. Ability to give constructive feedback to participants	The learning specialist will be able to: 17.a-j. Instruct individuals and/or groups in a specific subject matter area.	Classroom: lecture/demonstration (alternative) On-The-Job Training	Prerequiaites: Modules on 1) Learning Objectives and 2) Evaluation and Validation Subject matter: Instructor's role Instructional methods Training Resources: Instructor Training Bergevin, P. *Adult Education Procedures* Miller, W. R. *Instructors and Their Jobs* Staton, T. F. *How to Instruct Successfully*

Program Manager

Definition:

The program manager sets policy; plans, controls and manages the various training and employee development functions, curriculums, programs or courses, etc.; and interacts with all management levels in an organization.

Assumptions about role:

This role is not restricted to a director of training but is carried out by anyone performing a management-type activity.

Program Manager — Tasks and Competencies

Personnel

1. Initiates and follows up on personnel actions
   a. Ability to apply standard organization personnel practices
2. Evaluates performance of in-house program staff and provides direct feedback
   a. Knowledge of performance standards of positions within training program
   b. Ability to use performance evaluation measurement techniques
   c. Ability to compare on-the-job performance against established performance standards

Budget

3. Determines annual personnel, facilities and funding requirements
   a. Knowledge of priorities set by top management
   b. Knowledge of objectives for the training program
   c. Ability to make judgments about resources needed for the training program
   d. Ability to use computational techniques
4. Develops training budget or makes necessary inputs
   a. Ability to use information generated from analysis of personnel, facilities and funding requirements
   b. Ability to use organization's budget formulation procedures

Contracting

5. Develops training program procedures for contracting resources
   a. Knowledge of training program's contracting needs
   b. Knowledge of organization's contracting procedures
6. Prepare specifications for requests for proposals (RFP's)
   a. Knowledge of requirements and specifications of proposed training experiences
   b. Knowledge of format and procedures required for RFP's
7. Reviews and selects proposals submitted by contractors
   a. Knowledge of requirements and specifications of proposed training experiences
   b. Ability to rate contractor proposals against established criteria

c. Ability to use decision-making procedures appropriately

8. Evaluates the products/ services of contracted training and provides direct feedback to procurement officials, management and contractor
   a. Knowledge of required standards for products/ services as stated in contracts
   b. Ability to use performance measurement techniques

Policy

9. Comments on and/ or inputs into legislation, policies, procedures and directives affecting the training program
   a. Knowledge of training program
10. Insures compliance with training requirements and guidelines
   a. Understanding of Federal Personnel Manual Chapter 410
   b. Understanding of agency training requirements and guidelines
11. Interprets and applies relevant non-training directives, regulations, policies and procedures that affect the training program
   a. Knowledge of training program
   b. Ability to derive implications from legislation, policies and procedures that affect the training program
12. Meets all internal and external reporting requirements
   a. Knowledge of internal and external reporting requirements
   b. Ability to establish and implement feedback mechanisms by which information needed for reporting requirements will be collected
   c. Knowledge of prescribed formats for reporting
   d. Ability to prepare training reports as necessary
   e. Ability to monitor the reporting process
   f. Ability to meet deadlines

Management of Unit

13. Sets objectives for training program
   a. Ability to integrate the organization's goals and the goals of the training program
   b. Ability to formulate plan for the economic use of resources
   c. Ability to involve program staff in development of objectives
   d. Ability to establish realistic training program objectives
14. Develops guidelines for carrying out training program
   a. Knowledge of all facets of the training field
   b. Knowledge of requirements and specifications of training experiences
   c. Ability to plan for specific tasks and projects
   d. Ability to delegate responsibilty
15. Provides technical guidance to program staff
   a. Knowledge of all facets of the training field
   b. Ability to coach subordinates
16. Assesses degree to which the training program has met its objectives
   a. Knowledge of objectives of the training program

b. Ability to select appropriate program evaluation techniques and instruments
c. Ability to use appropriate program evaluation techniques and instruments

17. Effects necessary changes in training program
    a. Knowledge of implications of program evaluation results
    b. Ability to develop action plan for necessary revisions
    c. Ability to implement actions to revise program
18. Approves resources used in training program
    a. Knowledge of requirements and specifications of training program
    b. Ability to function within budgetary limits

External Interactions

19. Plans marketing strategy for training experiences
    a. Knowledge of promotion, publicity and public relations strategies
    b. Knowledge of intended audience for specific training experiences
    c. Ability to function within budgetary limits
21. Informs top management of training implications of proposed changes in mission, technology and organizational structure
    a. Understanding of the process of change
    b. Knowledge of identified training made necessary by proposed organizational changes
    c Ability to establish and maintain a pipeline to line and staff management
22. Assists supervisors and managers in being aware of what a specific training experience can provide
    a. Knowledge of available training experiences
    b. Ability to correlate identified training needs with specific training experiences
    c. Ability to establish and maintain a pipeline to line and staff management
23. Interacts with training community
    a. Understanding of advantages accruing from information and resource sharing
    b. Knowledge of individuals and organizations in the professional training community
    c. Ability to cooperate with other organizatio

Module 1
Personnel Management for Program Managers

ROLE: Program Manager

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Initiates and follows up on personnel actions a. Ability to apply standard organization personnel practices	The program manager will be able to: 1.a. Write: 1) selection criteria for a newly established position; 2) a position description showing a career ladder to the journeyman level; 3) justification for a support staff promotion.	Classroom: lecture/exercises (alternative) Independent Study: exercises	Subject matter: Staffing, position classification, promotions and awards Resources: Forms, contacts, schedules, approval process and prototype agency regulations Federal Personnel Manual (FPM) chapters

ROLE: Program Manager

Module 2
Fiscal Management for Program Managers

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
3. Determines annual personnel, facilities and funding requirements a. Knowledge of priorities set by top management b. Knowledge of objectives for the training program c. Ability to make judgments about resources needed for the training program d. Ability to compare on-the-job performance against established performance standards 4. Develops training budget or makes necessary inputs a. Ability to use information generated from analysis of personnel, facilities and funding requirements b. Ability to use organization's budget formulation procedures 19. Approves resources used in training program b. Ability to function within budetary limits 5. Develops training program procedures for contracting resources a. Knowledge of training program's contracting needs b. Knowledge of organization's contracting procedures 6. Prepares specifications for requests for proposals (RFP's) a. Knowledge of requirements and specifications of proposed training experiences b. Knowledge of format and procedures required for RFP's	The program manager will be able to: 3.a.b.c.d. Complete a needs assessment to determine personnel, facilities and funding requirements of a hypothetical training function. 4.a.b. Prepare a training budget according to the steps delineated in the prototype agency budget formulation process given the information derived from task 3. 19.b. Select appropriate resources for the training function using function objectives and budget.	Classroom: incident process (alternative) Independent Study: case history or detail Classroom: workshop (alternative) Independent Study: budget exercises	Prerequisite: Personnel Management for Personnel Management Specialists Subject matter: Management priorities Objectives of a training program Subject matter: Prototype agency budget formulation process Information generated from data requirements in task 3 Materials: Budget List of resources Objectives Activities

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
7. Reviews and selects proposals submitted by contractors a. Knowledge of requirements and specifications of proposed training experiences b. Ability to rate contractor proposals against established criteria c. Ability to use decision-making procedures appropriately 8. Evaluates the products/services of contracted training, and provides direct feedback to procurement officials, management and contractor a. Knowledge of required standards for products/services as stated in contract	5.a.b. Implement contracting procedures in order to meet hypothetical training needs. 6.a.b. Develop an RFP outline which is in major agreement with a model RFP outline provided. 7.a.b.c. 8.a. Rate the proposals using a sample RFP and given examples of contract proposals.	Classroom: case history (alternative) Independent Study: case history Classroom: lecture/group/ discussion/workshop Classroom: lecture/exercises	Subject matter: FPM Chapter 304 - "Employment of Experts and Consultants" Agency contracting procedures Subject matter: Criteria for selection of contractor/outside consultant Materials: Model RFP Materials: Five contract proposals Detailed rating of five proposals

ROLE: Program Manager

Module 3
Evaluation—People, Products and Program

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
2. Evaluates performance of in-house program staff and provides direct feedback a. Knowledge of performance standards of positions within training program b. Ability to use performance evaluation measurement techniques c. Ability to compare on-the-job performance against established performance standards 8. Evaluates the products/services of contracted training and provides direct feedback to procurement officials, management and contractor b. Ability to use performance measurement techniques 16. Assesses degree to which the training program has met its objectives a. Knowledge of objectives of the training program b. Ability to select appropriate program evaluation techniques and instruments c. Ability to use appropriate program evaluation techniques and instruments 15. Provides technical guidance to program staff a. Knowledge of all facets of the training field b. Ability to coach subordinates	The program manager will be able to: 2.a.b.c. Complete a performance evaluation given data gathered about at least one employee's performance over a three-month period. 8.b. Synthesize the data and prepare an evaluation report which specifies the degree to which a contractor's product and/or service met its goal, using a packet containing the contractor's final report, participant's reactions and rating of learning, and training staff members' evaluation of services and/or products. 16.a.b.c. Apply appropriate program evaluation techniques and instruments to a hypothetical training program and data.	Classroom: simulation (alternative) Independent Study: write a performance appraisal Classroom: lecture/simulation/guided discussion	Prerequisite: Personnel Management for Program Managers Subject matter: Performance evaluation techniques Subject matter: Program evaluation techniques and instruments Sample training program

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
	15.a.b. Compile a list of resources that could prove useful to the training staff.	Classroom: lecture/workshop (alternative) Independent Study: research assignment	Materials: Lists of private consulting firms Uses of ERIC Lists of an agency's offices and their functions

Module 4
Policy and Program Controls

ROLE: Program Manager

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
9. Comments on and/or inputs into legislation, policies, procedures and directives affecting the training program a. Knowledge of training program 10. Insures compliance with training requirements and guidelines a. Understanding of Federal Personnel Manual Chapter 410 b. Understanding of agency training requirements and guidelines 11. Interprets and applies relevant non-training directives regulations, policies and procedures that affect the training program a. Knowledge of training program b. Ability to derive implications from legislation, policies, procedures and directives for the training program	The program manager will be able to: 9.a. 11.a.b. Identify elements affecting the training program and their implications, given sample training and non-training legislation policy statements, procedures and directives. 10.a.b. Respond to inquiries on common legal and regulatory questions, using FPM Chapter 410 as a reference.	Classroom: lecture/discussion (alternative) Detail to agency operating training function Independent Study: FPM Chapter 410 workshop (alternative) Detail to an agency operating training function	Resources and materials: Report Covering the Effectiveness of Implementation of the Government Employees Training Act Sample agency directives and policy statements

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Module 5
Reports

ROLE: Program Manager

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
12. Meets all internal and external reporting requirements a. Knowledge of internal and external reporting requirements b. Ability to establish and implement feedback mechanisms by which information needed by reporting requirements will be collected c. Knowledge of prescribed formats for reporting d. Ability to prepare training reports as necessary e. Ability to monitor the reporting process Ability to meet deadlines	The program manager will be able to: 12. a.c.d.f. Explain the need for various internal and external reporting requirements.	Classroom: small group discussion/ individual exercise	Prerequisite: Information in Training Administrator module: Reports and Records
	12.b.e. Construct a system for monitoring input of required data with a schedule of completion dates including progress checks, given FPM Chapter 410 and a list of agency training records.		Materials: Agency training records Agency reporting formats "Employee Training in the Federal Service" (CSC annual report)

Module 6
Management of the Training Program

ROLE: Program Manager

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
17. Effects necessary changes in training program a. Knowledge of implications of program evaluation b. Ability to develop action plan for necessary revisions c. Ability to implement actions to revise program 13. Sets objectives for training program a. Ability to integrate the organization's goals and the goals of the training program b. Ability to formulate plan for the economic use of resources c. Ability to involve program staff in development of objectives d. Ability to establish realistic training program objectives 14. Develops guidelines for carrying out training program a. Knowledge of all facets of the training field b. Knowledge of requirements and specifications of training experiences c. Ability to plan for specific tasks and projects d. Ability to delegate responsibility 18. Approve resources used in training program a. Knowledge of requirements and specifications of training program	The program manager will be able to: 17.a.b.c. Develop an action plan to effect necessary changes in training program so that the program will meet its original objectives. 13.a.b.c.d. 14.a.b.c.d. 18.a. Write objectives and guidelines given the organization's goals and training needs which will include 1) an integration of the organization's goals and the training, 2) a plan for the economic use of resources, 3) plans for projects.	Detail to an operating agency training program Classroom: lecture/exercises/workshop (alternative) Independent Study: readings/exercises	Subject matter: Program evaluation techniques Objectives of training program Prerequisite: Management theory courses Materials and resources: Information from training needs analysis Information on organization's goals

Module 7
Communications

ROLE: Program Manager

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
20. Informs top management of training implications of proposed changes in mission, technology, and organizational structure a. Understanding of the process of change b. Knowledge of identified training made necessary by proposed organizational changes c. Ability to establish and maintain a pipeline to line and staff management 21. Assists supervisors and managers in being aware of what a specific training experience can provide a. Knowledge of available training experiences b. Ability to correlate identified training needs with specific training experiences c. Ability to establish and maintain a pipeline to line and staff management	The program manager will be able to: 20.a.b.c. 21.a.b.c. Communicate information on training implications of proposed changes in organization and specific training experiences to facilitate those changes.	Classroom: lecture/group discussion/ individual and group presentations	Subject matter: Information from Consultant module 4 on training implications of proposed organizational changes Information on specific training experiences Organizational histories Role of the program manager in the organization
19. Plans marketing strategy for training experiences a. Knowledge of promotion, publicity and public relations strategies b. Knowledge of intended audience for specific training experiences c. Ability to function with budgetary limits	19.a.b.c. Develop a plan for a marketing strategy which will inform intended audience about the specifics of the training experience, given information concerning a training experience.	Classroom: lecture/exercises	Subject matter: Information on specific experiences Marketing techniques
22. Interacts with training community a. Understanding of advantages accruing from information and resource — sharing b. Knowledge of individuals and organizations in the professional training community c. Ability to cooperate with other organizations	22.a.b.c. Develop awareness of the need to maintain interaction with the training community for the purpose of sharing information and resources with the members of that community.	Detail to an operating agency training program	Subject matter: Information about the training community Clearinghouse concept Materials: Lists of formal and informal professional organizations

Training Administrator

Foreword

Definition:

The training administrator arranges, coordinates, and maintains the support services of the various training and development programs.

Assumptions about role:

These tasks are very necessary for ensuring that an operation runs well. It is advantageous, where possible, that support staff carry out this role. For that purpose, responsibilities have been added to the role to enlarge its scope.

Training Administrator — Tasks and Competencies

Schedules

1. Schedules use of training facilities
   a. Ability to resolve scheduling conflicts and problems
   b. Knowledge of what facilities are required for the training experience
   c. Ability to match facility characteristics to type of training
   d. Knowledge of procedures for acquiring training facilities
2. Maintains schedules of training personnel
   a. Ability to record and distribute training personnel schedules
   b. Ability to identify potential scheduling conflicts

A/ V Equipment

3. Coordinates the use and maintenance of A/ V equipment
   a. Ability to schedule the use of A/ V equipment
   b. Knowledge of sources to maintain A/ V equipment
   c. Ability to operate A/ V equipment

Training Preparation

4. Coordinates preparation and delivery of training materials and supplies to designated training facilities
   a. Knowledge of location of training materials and supplies
   b. Knowledge of delivery procedures
5. Identifies training facilities
   a. Knowledge of available training facilities
   b. Ability to identify appropriate training facilities
6. Arranges for set-up of training facilities
   a. Knowledge of available training furniture and accessories
7. Secures needed housing for participants and training personnel
   a. Knowledge of available housing for participants and training personnel
   b. Knowledge of housing needs for participants and training personnel
   c. Ability to match available housing with participants and training personnel's needs

8. Processes training requests
   a. Knowledge of procedures necessary to enroll in training
   b. Ability to compare participant nomination form against established criteria
   c. Ability to make and/ or feedback decisions regarding acceptence of nomination
   d. Ability to manage spaces in training programs
9. Distributes acceptance letters, training information and materials to participants
   a. Knowledge of standard training materials
   b. Ability to package training materials

Procurement

10. Procures equipment, supplies and materials
    a. Ability to locate and use procurement procedures to obtain previously identified learning materials, supplies and equipment
11. Provides A/ V equipment
    a. Ability to locate and procure previously identified A/ V equipment

Announcements and Catalogs

12. Prepares and disseminates announcements and catalogs of training experiences
    a. Ability to compile information
    b. Understanding of graphics and reproduction services

Reports and Records

13. Provides and explains required training forms and guides to appropriate organizational elements
    a. Understanding of required forms and guides
14. Develops and monitors training record systems
    a. Knowledge of record keeping systems
    b. Ability to compile information
15. Prepares statistical portions of training reports
    a. Ability to extract information from computer print-outs
    b. Ability to compile information
    c. Ability to tabulate data
    d. Ability to use required computational procedures
    e. Ability to complete CSC Annual Training Report
16. Prepares cost reports of training experiences
    a. Ability to extract information from computer print-outs and other data sources
    b. Ability to compute cost of training

Training Resource Library

17. Prepares and circulates lists of new training resources in the training office
    a. Ability to compile information
    b. Ability to prepare bibliographies
18. Develops and maintains training resource library
    a. Ability to develop cataloging and circulation systems

Inquiries

19. Answers inquiries about available training
    a. Ability to interpret relevant portions of FPM Chapter 410

Module 1
Scheduling

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Schedules use of training facilities a. Ability to resolve scheduling conflicts and problems 2. Maintains schedules of training personnel a. Ability to record and distribute training personnel schedules b. Ability to identify potential scheduling conflicts 3. Coordinates the use and maintenance of A/V equipment a. Ability to schedule the use of A/V equipment	The training administrator will be able to: 1.a. 2.a.b. 3.a. Construct a system for scheduling training resources using knowledge of course dates, learning specialist assignments, available facilities and A/V equipment which 1. is free of conflict and 2. accommodates new information	Independent Study: case study (alternative) Classroom: workshop	Materials: Lists of course and staff schedules, facilities and A/V equipment

Module 2
Training Preparation

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Schedules use of training facilities b. Knowledge of what facilities are required for the training c. Ability to match facility characteristics to type of training 4. Coordinates preparation and delivery of training materials and supplies to designated training facilities a. Knowledge of location of training materials and supplies b. Knowledge of delivery procedures 5. Identifies training facilities b. Ability to identify appropriate training facilities 6. Arranges for set-up of training facilities a. Knowledge of available training furniture and accessories 7. Secures needed housing for participants and training personnel b. Knowledge of housing needs for participants and training personnel c. Ability to match available housing with participants and training personnel's needs 8. Processes training requests b. Ability to compare participant nomination form against established criteria c. Ability to make and/or feedback decisions regarding acceptance of nomination d. Ability to manage spaces in training programs	The training administrator will be able to: 4.a.b. Construct a checklist, using materials provided, which indicates the sequence for the orderly preparation and delivery of training equipment, supplies and materials. 1.b.c. 5.b. Choose from list of training facilities all those which meet course specifications according to instructor's needs and sample training request forms. 8.b.c.d. Choose participants for training who meet the established criteria using sample training request forms and course director's request forms, according to available training spaces. 6.a. Select the appropriate diagram for arrangement of required furniture and training aids in training facility, using materials provided, to meet course specifications. 7.b.c. Select suitable housing for participants from list of available housing so as to meet housing needs of participants indicated by sample training request forms.	Classroom: lecture/in-basket exercise (alternative) On-The-Job Training	Materials: Sample training request forms Course director's request form List of training facilities List of available housing Resources: *24 Group Methods and Techniques in Adult Education*

Module 3
Procurement Procedures

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
1. Schedules use of training facilities d. Knowledge of procedures for acquiring training facilities 10. Procures equipment, supplies and materials a. Ability to locate and use procurement procedures to obtain identified learning materials, supplies and equipment 11. Provides A/V equipment a. Ability to locate and procure previously identified A/V equipment	The training administrator will be able to: 1.a. 10.a. 11.a. Obtain needed training facilities, materials and equipment for use in the training program in accordance with Federal procurement regulations and agency procedures.	Independent Study: readings from *Federal Procurement Regulations*	Resources: *Federal Procurement Regulations*

Module 4
A/V Equipment

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
3. Coordinates the use and maintenance of A/V equipment b. Knowledge of sources to maintain A/V equipment c. Ability to operate A/V equipment	The training administrator will be able to: 3.c. Demonstrate the use of slide and film projectors, tape recorders, opaque and overhead projectors, vu-graphs, record players and video tape equipment in a simulated training environment without assistance. 3.b. List the most common causes of operating problems in the use of eight types of A/V equipment.	Classroom: demonstration/workshop (alternative) On-The-Job Training	Materials: Manufacturer's guides to A/V equipment Slide and film projectors Vu-graphs Record players Video tape equipment Tape recorders Opaque and overhead projectors List of most common causes of operating problems

Module 5
Training Catalogs and Announcements

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
12. Prepares and disseminates announcements and catalogs of training experiences a. Ability to compile information b. Understanding of graphics and reproduction services	The training administrator will be able to: 12.a. Write a course announcement using information on course dates, objectives and content, selection criteria. 12.b. Design a first draft course announcement cover by choosing art work, paper stock, typeface and ink color using information provided by the instructor according to the principles of layout and design.	Classroom: lecture/individual exercise (alternative) On-The-Job Training	Subject matter: Principles of layout and design Principles of writing-editing Materials: Sample announcements Selection criteria Course scheduling information Resources: *GPO Style Manual* Printing, layout and design *Pocket Pal*—International Paper Co. GPO paper, ink, and samples

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
8. Processes training requests a. Knowledge of procedures necessary to enroll in training 13. Provides and explains required training forms and guides to appropriate organizational elements a. Understanding of required forms and guides	The training administrator will be able to: 8.a. Enroll participants in training, given a list of training sites and forms. 13.a. Explain how to complete a training form	On-The-Job Training	Materials: *Of 170: Request Authorization Agreement and Certificate of Training* List of training sites and forms needed to gain entrance

Module 7
Reports and Records

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
14. Develops and monitors training record systems a. Knowledge of record keeping systems b. Ability to compile information 15. Prepares statistical portions of training reports a. Ability to extract information from computer print-outs b. Ability to compile information c. Ability to tabulate data d. Ability to use required computational procedures e. Ability to complete CSC Annual Training Report 16. Prepares cost reports of training experiences a. Ability to extract information from computer print-outs and other data sources b. Ability to compute cost of training	The training administrator will be *able to*: 14.a.b. Construct a record-keeping system which meets the needs of his or her office. 15.e. Name all sources of information needed to complete the CSC Annual Training Report. 15.a. 16.a. Select appropriate responses to exercises by extracting information from computer print-outs. 15.d. Total, average and convert to percentages using calculator and data provided. 15.b.c 16.b. Complete selected statistical portions of a training report using sample computer print-outs and calculators.	*Classroom*: lecture/exercises	Subject matter: How to set up a record-keeping system Materials: Sample course director reports Of 170's IDP's Direct and indirect cost figures FPM Bulletin—"Annual Report of Training Activities Fiscal year——" Sample computer print-outs Exercise with questions and answers about print-outs Training experience cost data Calculators Sample training reports Resources: Pamphlet T-7, "Employee Training in the Federal Service"

Module 8
Training Resource Library

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
17. Prepares and circulates lists of new training resources in the training office a. Ability to compile information b. Ability to prepare bibliographies 18. Develops and maintains training resource library a. Ability to develop cataloging and circulation systems b. Ability to maintain cataloging and circulation systems	The training administrator will be able to: 17.a.b. Prepare a bibliography of professional journals, books, films, cassettes and training aids using a list of resources according to guidelines highlighted in the lecture.	Classroom: lecture/individual exercises/ guided discussion (alternative) Independent Study: case history	Subject matter: How to prepare a bibliography Materials: Lists of resources for bibliography on all five roles of the EDS Reference text on bibliographies Checklist of appropriate resources
	18.a.b. Construct a cataloging system for the training resource library. 18.a.b. Construct a circulation system for the training resource library.	Detail to a library	Subject matter: Cataloging and circulation systems Materials: Description of resources typically found in a training resource library Case history (description) of a training library

Module 9
FPM Chapter 410

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
19. Answers inquiries about available training a. Ability to interpret relevant portions of FPM Chapter 410	The training administrator will be able to: 19.a. Using FPM Chapter 410 as a reference, respond to inquiries on common legal and regulatory questions which arise during the administration of a training program and processing of training requests.	Independent Study: existing workshop on FPM Chapter 410	Materials: - List of available training

Module 10
Training Program and Agency's Standard Operating Procedures

ROLE: Training Administrator

TASKS AND COMPETENCIES	TERMINAL OBJECTIVE	LEARNING STRATEGY	CONTENT
4. Coordinates preparation and delivery of training materials and supplies to designated training facilities a. Ability to arrange delivery of training materials and supplies 5. Identifies training facilities a. Knowledge of available training facilities 6. Arranges for set-up of training facilities a. Knowledge of available furniture and accessories 7. Procures required housing for participants and training personnel a. Knowledge of available housing for participants and training personnel 9. Distributes acceptance letters, training information and materials to participants a. Knowledge of standard training materials b. Ability to package training materials	The training administrator will be able to: 5.a. 6.a. 7.a. 9.a. Identify training facilities, furniture, housing, and materials using office, agency and other informational sources to satisfy specified training program needs. 4.a. 9.b. Explain critical features of standard operating procedures in his/her office for obtaining the services of the support staff, using distribution lists for disseminating announcements and catalogues, and using office services (or like - titled function) for delivery of training equipment, supplies, and materials in such a way that another employee can follow the standard operating procedures.	On-The-Job Training	Subject matter: Standard operating procedures in training office and agency Resources: Existing office procedural manuals; contacts with experienced training office staff Existing lists of training facilities, furniture, housing, and training materials.

Core Competencies

1. Ability to communicate (orally and in writing)
2. Ability to gather data
3. Ability to analyze information
4. Ability to plan and organize
5. Ability to set priorities and use time efficiently
6. Ability to solve problems
7. Ability to maintain currency in the state-of-the-art in training
8. Knowledge of agency organization
9. Ability to establish rapport and credibility with agency personnel
10. Knowledge of adult learning theory
11. Knowledge of the structure and components of the field of training
12. Knowledge of the training program
13. Understanding of how training interrelates with personnel management
14. Knowledge of available training resources
15. Ability to use group processes effectively

Appendix A

Referenced Resources

The following is a list of selected resources that are cited in the learning modules.

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